Facility Clerk

Buddy Orientation Checklist

|  |  |  |  |
| --- | --- | --- | --- |
| Job Duties | Date | Trainer Initials | Buddy Initials  |
| **General:** |  |  |  |
| Review of Care of Model |  |  |  |
| Resident Care Manual  |  |  |  |
| Recreation Manual  |  |  |  |
| **Communication: [list all that apply for your organization below are some examples]** |  |  |  |
| Residents |  |  |  |
| Families |  |  |  |
| Co-Workers |  |  |  |
| **Department Specific Duties [list all that apply for your organization below are some examples]** |  |  |  |
| Show and explain the morning office **routine (insert all that apply for your organization some examples below)*** **Insert site specific office routines**
* **Unlock filing cabinets**
* **Turn on office equipment**
* **Surveillance TV**
 |  |  |  |
| Explain phone system (answering and transferring calls) |  |  |  |
| Explain paging system  |  |  |  |
| Show and explain procedure for scheduling reservations including reservation binder **(Insert site specific information ie. hospitality suite)** |  |  |  |
| Explain how to book appointments **(DATS, appts for residents, interviews etc.)** |  |  |  |
| Explain procedure for how to respond to and document resident incidents.  |  |  |  |
| Show and explain the procedures for move ins and outs* Paperwork
* Take home envelopes
* Welcome bags
 |  |  |  |
| Show and explain payment and deposit procedures |  |  |  |
| Explain site tour procedure |  |  |  |
| Show where to get information for rent inquiries |  |  |  |
| Show and explain computer systems**Update Resident information lists (Resident/Tenant list, birthday list, move in/out lists, etc.)** |  |  |  |
| Show location of staff schedules, phone lists and explain staff coverage process.  |  |  |  |
| Supply ordering process |  |  |  |
| Invoicing procedure  |  |  |  |
| Completed work order process (input/file) |  |  |  |
| Explain the incoming and outgoing mail procedure |  |  |  |
| Explain contractor procedure* Scheduling
* Contractor Hazard Management Record
 |  |  |  |
| Record retention process |  |  |  |
| Binder updating processes* Which binders need to be updated
* Where are files kept that need updating
 |  |  |  |
| Explain and show miscellaneous clerical activities |  |  |  |
| **Occupational Health and Safety Procedures [list all that apply for your organization below are some examples]** |  |  |  |
| First Aid Procedures |  |  |  |
| Go over Job Hazard Assessment |  |  |  |
| Go over SWPP for administration |  |  |  |
| Hazard Reporting process  |  |  |  |
| Incident Reporting process |  |  |  |
| **Payroll: [list all that apply for your organization below are some examples]** |  |  |  |
| Time Sheets |  |  |  |
| Documentation |  |  |  |
| Staff Schedules |  |  |  |
| **Committee and Meetings: [list all that apply for your organization below are some examples]** |  |  |  |
| Department meetings |  |  |  |
| General Staff Meeting |  |  |  |
| OH & S meetings |  |  |  |
| Distribution of Minutes |  |  |  |
| Memo books |  |  |  |
|  |  |  |  |
|  |  |  |  |